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USSR: Early July Grain Prospects

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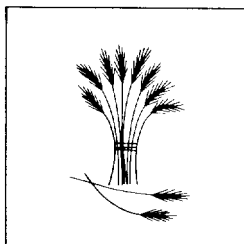
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Environment Analysis Brief

USSR: Early July Grain Prospects

Summary

As of 7 July, Soviet grain production is estimated at 195 million metric tons, unchanged from our earlier mid-June estimate. Production of this amount would exceed last year's poor harvest by some 55 million tons but would fall short of the 1976 Soviet plan of approximately 205 million tons. Total wheat production is estimated at 78 million tons.

Conditions in the winter grain belt—centered in European Russia—have remained unusually favorable for the growth and development of the surviving fall-sown grains. Although conditions are conducive to the development of plant diseases and grain lodging, available evidence indicates minimal problems to date. As a result, we have not changed our earlier winter grain estimate of 45 million metric tons.

Overall, prospects for spring grain production remain generally favorable. In European Russia, crop conditions are almost uniformly good, the only exception being in the southern Ukraine where soil moisture is low. In contrast, an uneven pattern of crop conditions exists in the main spring grain region east of the Urals. Since mid-June, numerous localized showers over much of this area have produced an irregular pattern of crop development. Areas exhibiting prospects for above-average yields are interspersed with areas which have suffered irreparable damage due to low soil moisture. Spring grain production is currently estimated at 150 million metric tons, second only to the 1973 spring grain production of 159 million tons and some 59 million tons more than last year's disastrous spring grain harvest.

Note: This paper was produced by the Office of Geographic and Cartographic Research and coordinated with the Office of Economic Research. Comments and questions may be directed to [REDACTED] Code 143, Extension 3748. Date of information 7 July 1976.

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Status of Winter Grains

Last autumn's low soil moisture and this year's early season winterkill resulted in an estimated loss of 11 to 12 million hectares of winter grains, nearly a third of the fall-sown area. Much of the surviving winter grain acreage contains thin and spotty stands of plants, indications of below-average yields. However, since early spring, ideal weather conditions—above normal precipitation and cool temperatures—have existed over most of the main winter grain area of European Russia. These conditions together with a lack of substantial evidence of plant disease or grain lodging have partially offset the expected yield reductions of the surviving grains.* As a result, we have not changed our earlier winter grain estimate of 45 million metric tons, 3.5 million tons less than last year's poor harvest.

By early July, harvesting of fall-sown wheat, the major winter grain, had moved into the central Ukraine, the lower Volga, and the North Caucasus. In Central Asia, where the harvest has been reported as "good almost everywhere," barley yields have been reported as high as 30 quintals per hectare. In the next two weeks harvest activity will intensify in the main grain belt of Central European USSR.

As of this date, weather and soil moisture conditions in the Ukraine are favorable for grain harvesting operations. However, in much of Central European Russia, high levels of soil moisture are currently handicap to mechanized farming operations and could eventually cause harvest delays.

Status of Spring Grains

Spring grain production is presently estimated at 150 million metric tons, some 59 million tons more than last year's disastrous spring grain harvest and second only to the record 1973 spring grain production of 159 million tons. Such

*Environmental conditions during the spring growth season in European Russia have been favorable for the development of leaf diseases (rust and mildew) on cereal grains. However, according to reports of the USDA Winter Wheat Team, which visited Rostov, Stavropol, and central and eastern Ukraine, no significant damage from leaf diseases was observed. Inasmuch as the occurrence of epidemic leaf diseases would have been evidenced during this inspection, it is now assumed that diseases will have no unusual effect on production of cereal grains in European Russia during the 1976 growing season. We have no information concerning the status of leaf diseases in West Siberia and Kazakhstan.

Due to persistent wet weather that has occurred in European Russia, the occurrence of unusually high infestation of weeds and the lodging of cereal grains would be expected. Observations of the Winter Wheat Team traveling through the Ukraine confirm above-average growth of weeds in many fields. However, problems due to the lodging of grains are reportedly minimal as of early July.

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production assumes normal growing and harvesting conditions will prevail from early July to late September.

The Soviets are depending upon the successful development of their spring grain crops to offset the shortfall in winter grains. In most areas of the USSR this year, the sowing of spring grains began near the long-term average although approximately ten days later than in 1975. As of early June, sowing was completed throughout the USSR with the spring wheat and corn sowing plans reportedly overfulfilled. The total area sown to spring grains, including corn, is estimated at a record 104 million hectares (see Table 1).

TABLE 1

USSR: Estimated Harvested Area

	Million Hectares	
	Average 1973-75	Estimated 1976
Total	127	128
Winter Grains	28.5	26 ¹
Spring Grains	98.5	102 ²

¹ Reflects an estimated 9.5 million hectares of winterkill plus an allowance of approximately 2 million hectares for use as green chop and spring pasture out of a total sown acreage of 37.5 million hectares.

² We estimate sown acreage at 104 million hectares. Past historical relationships between spring sown and final harvested acreage would suggest an abandonment of roughly 2 million hectares.

In northern European Russia, cool temperatures and above-average precipitation throughout the spring have been favorable for the growth and development of the spring grains. Prospects for above-average yields are likely. Spring grain yield potential is particularly high in the Volga-Vyatka and Urals regions [REDACTED] Moisture reserves in most of southern European Russia are near normal and crop development is reportedly good. The only areas in European USSR currently suffering from moisture deficiencies are parts of the southern Ukraine (Odessa, Nikolayev, Kherson oblasts) and the northern Caucasus (northern Stavropol Kray and eastern Rostov oblast).

In contrast to the rather uniform crop development of European Russia, and uneven pattern of crop conditions exists in the main spring grain areas east of the Urals. Since mid-June and through the first four days of July, a series of weak weather fronts passed over the Urals and northern Kazakhstan leading to numerous localized showers. As a result, there is currently an irregular pattern of crop development. Areas exhibiting potential for above-average yields are interspersed with areas which have suffered irreparable damage due to the low soil moisture and a lack of significant rainfall (see map). Soil moisture deficiencies in areas of northeast Kazakhstan and western Altay Kray have been especially injurious in as much as spring grains in these areas have reached the critical stages of plant development [REDACTED]

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Total Grain Production

The effects of below-average weather conditions since mid-June in some regions of the Soviet Union have been offset by above-average crop conditions in other regions. Our current estimate for total grain production remains unchanged at 195 million metric tons,* 55 million tons more than last year's poor harvest and some 14 million tons more than the 1971-75 total grain average (see Table 2).

TABLE 2

USSR: Production of Grain ¹

	Million Metric Tons							
	Annual Average						Annual Average	Preliminary Estimate
	1966-70	1971	1972	1973	1974	1975	1971-75	1976
Total	167.6	181.2	168.2	222.5	195.6	139.9	181.5	195
Winter Grains ²	50.8	63.0	40.6	63.5	62.5	48.6	55.6	45
Spring Grains ³	116.7	118.2	127.6	159.0	133.1	91.2	125.8	150

¹ Because of rounding, components may not add to the totals shown.

² Includes wheat, rye, and barley.

³ Includes wheat, barley, oats, corn, pulses, and miscellaneous grains.

A harvest of 195 million tons would be less than the Soviet production plan of about 205 million tons for 1976 and considerably below the average annual production of 215-220 million tons called for in the 1976-80 plan.

Total wheat production is currently estimated at 78 million metric tons, about 12 million tons above the 1975 harvest but substantially less than the 1971-75 average of 89 million metric tons.

*The EAS crop monitoring system is based on a reduction of potential production as yield limiting events occur. Crop production potential is projected from short-range weather forecasts and under the assumption of subsequent *optimum* weather conditions. Since our last estimate of mid-June, the potential production capabilities for grain crops in the USSR has been reduced from 215 to 210 million tons. Most of this reduction reflects limitations of the yield potential of spring wheat within the areas marked "low" on the map of "spring grain yield potential." This current *potential* yield estimate may be lowered as the season progresses depending upon deviations from optimum weather conditions from now until harvest time.

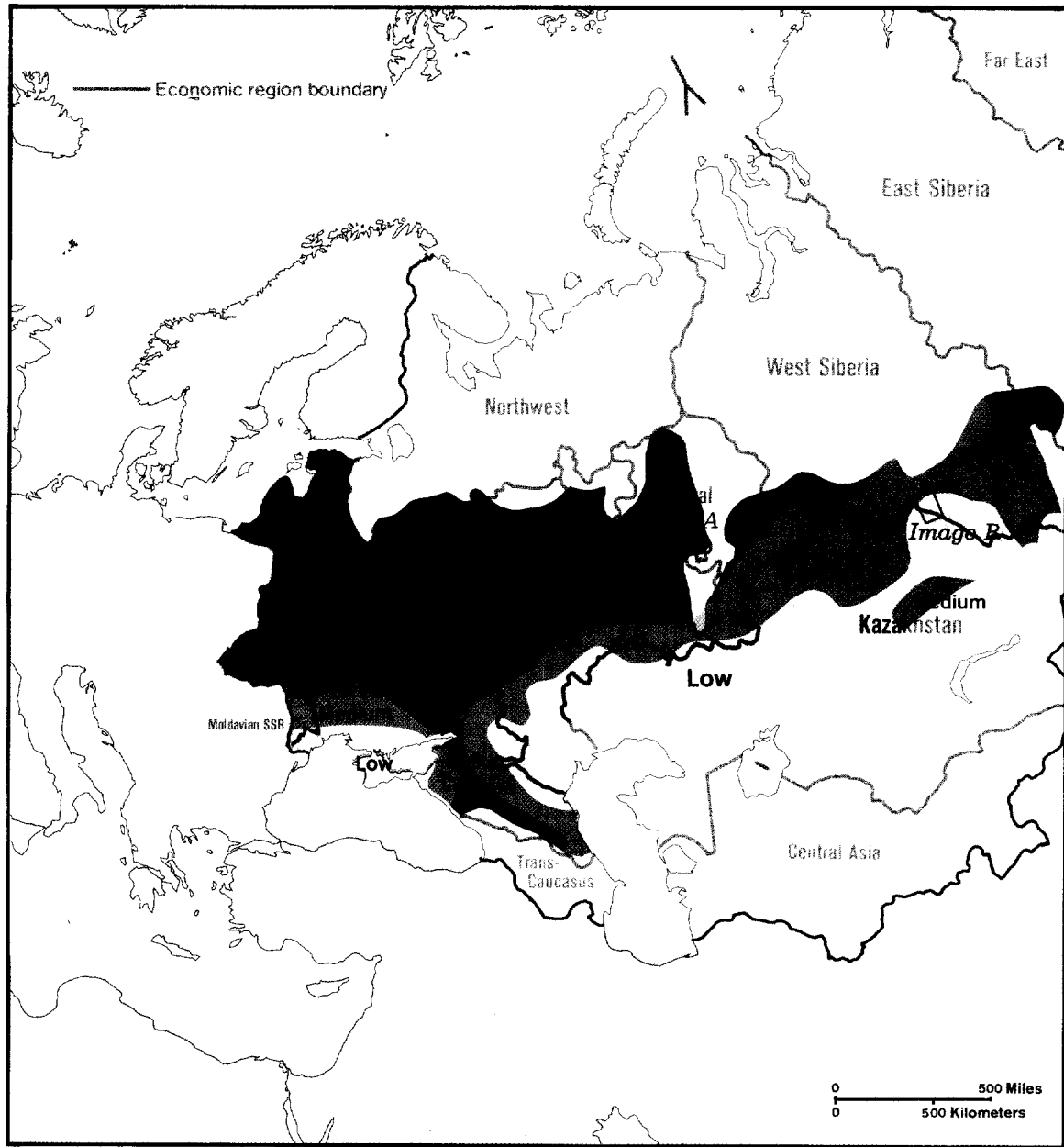
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USSR: Spring Grain Yield Potential as of July 1, 1976



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